Past-Client Touch Plan: 12 Months

One simple, useful contact a month after closing. Check each box as you go.

Month by month

- [ ] Closing week: handwritten thank-you note and a closing-day photo or small gift
- [ ] Month 1: check in. Is the move going smoothly? Offer vendor names (plumber, painter)
- [ ] Month 2: send a short home-care tip for the season
- [ ] Month 3: ask for an honest review or testimonial, with a direct link
- [ ] Month 4: send a local-events or neighborhood roundup
- [ ] Month 5: share a quick market update for their neighborhood
- [ ] Month 6: half-year check-in call, no sales pitch
- [ ] Month 7: send a seasonal maintenance checklist
- [ ] Month 8: invite them to a client event or community activity
- [ ] Month 9: send a useful tip on property taxes or insurance review (point to their pros)
- [ ] Month 10: ask who they know who is thinking of buying or selling
- [ ] Month 11: send a short year-end market update
- [ ] Month 12: home anniversary note and an optional value update, if they want one

Rules that keep it useful

• Lead with something helpful. One ask per year is plenty.
• Use the contact method each client prefers, and honor opt-outs right away.
• Send the same quality of service to every past client.

Marketing form, not legal advice. Follow your state's rules and your brokerage's policies for client communication.

Tracker and Notes

Fill in one row per past client.

CLIENT	CLOSED	PREFERRED CONTACT	LAST TOUCH	NEXT TOUCH

Notes: kids, pets, hobbies, anniversaries

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